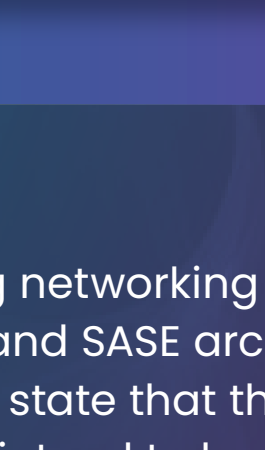


Enterprises Reveal Their Plans for SD-WAN And SASE, Remote Worker Support, And Their Expectations for Managed Services

Number of Enterprise Surveyed



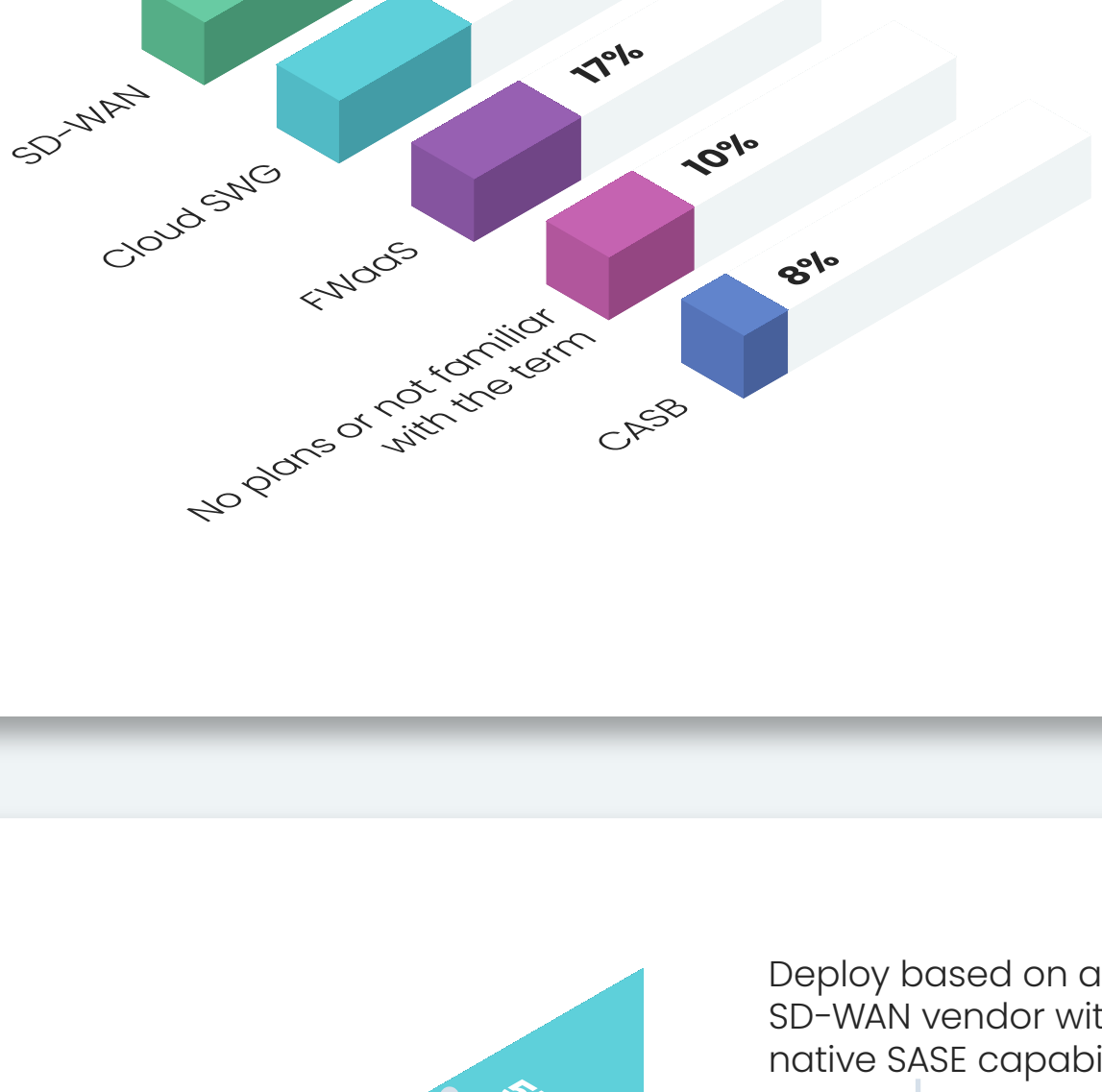
1,350+

NETWORKING AND SECURITY FUSION – SD-WAN AND SASE

Enterprises are increasingly fusing networking and security planning by adopting a SD-WAN and SASE architecture. One-third of surveyed enterprises state that they have already deployed SASE and most intend to leverage both their networking and security vendors.

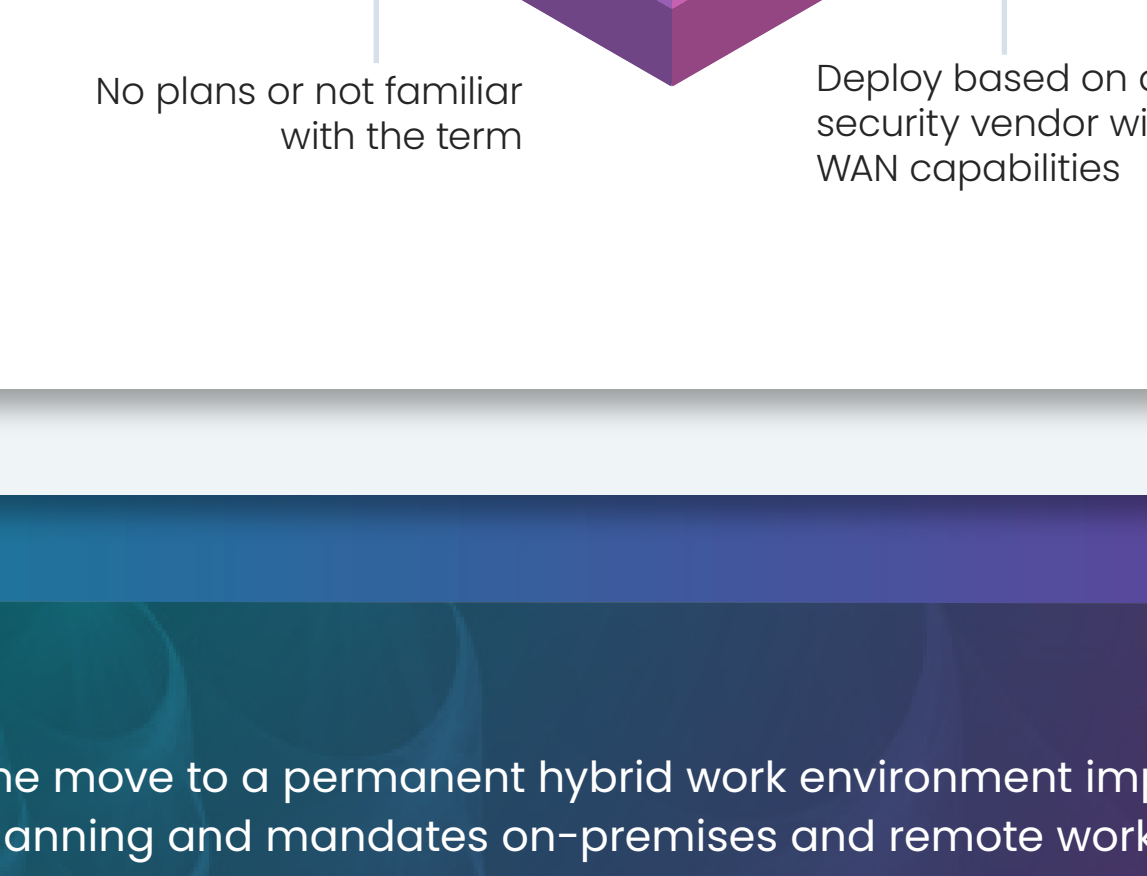
SASE Momentum

SASE, and the fusion of SD-WAN with security, has taken center stage for many in IT. Evaluating and selecting a WAN increasingly integrates security planning. Twenty-nine percent state that they are already deploying what they consider to be a SASE architecture, with another fifty-five percent planning to deploy within the next 12-24 months.



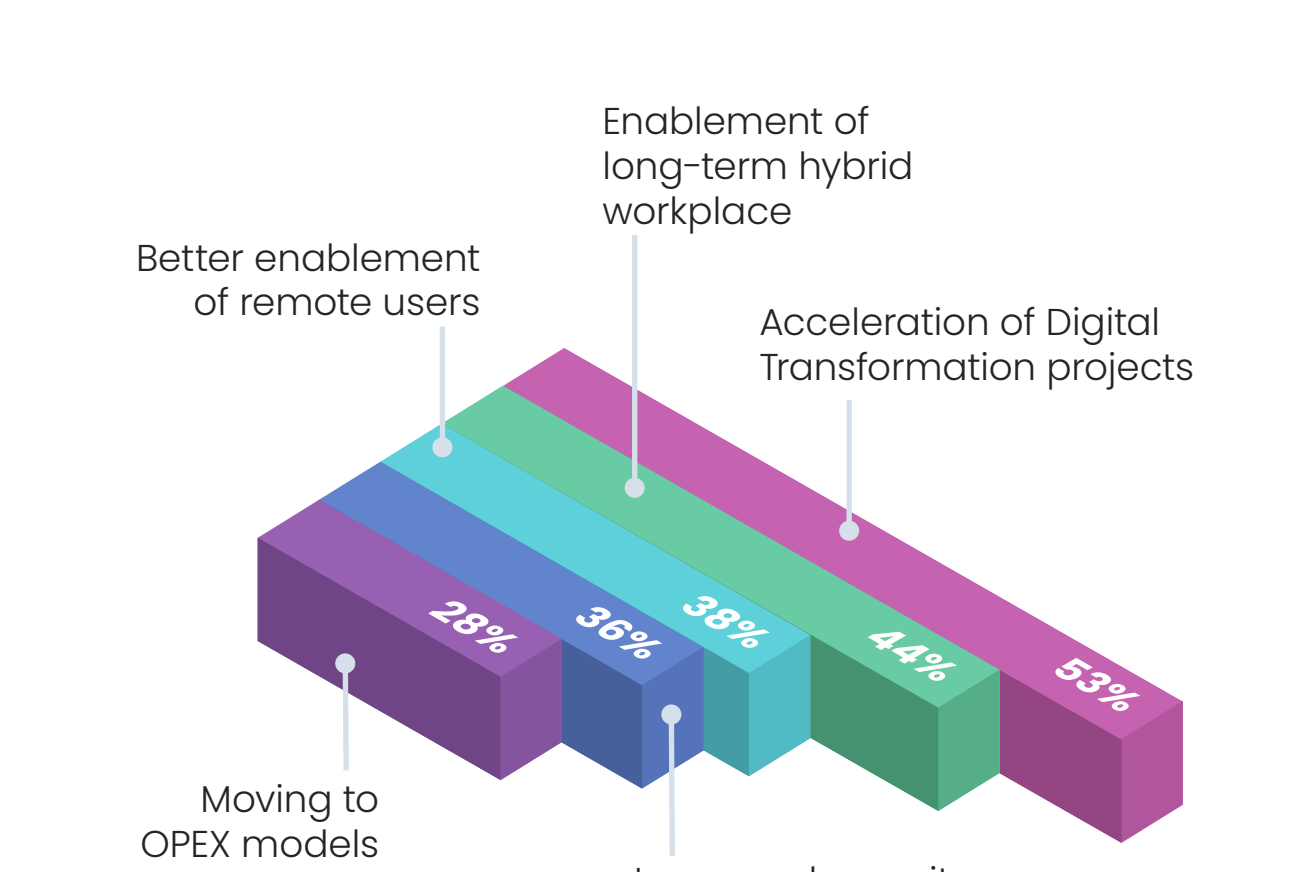
SASE Capabilities Requested

For SASE features, it isn't surprising that thirty-four percent identify SD-WAN connectivity as key, a SASE foundational feature and on-par with the different security capabilities required. Next is a cloud security gateway at thirty percent, followed by a managed firewall at seventeen percent.



SASE Deployment Approaches

Looking at SASE deployments, fifty-one percent plan to select a best-of-breed solution combining their WAN and security vendor, with only twenty-five percent preferring an all-in-one offer. Only twelve percent plan to rely on their security vendor to provide all WAN components.

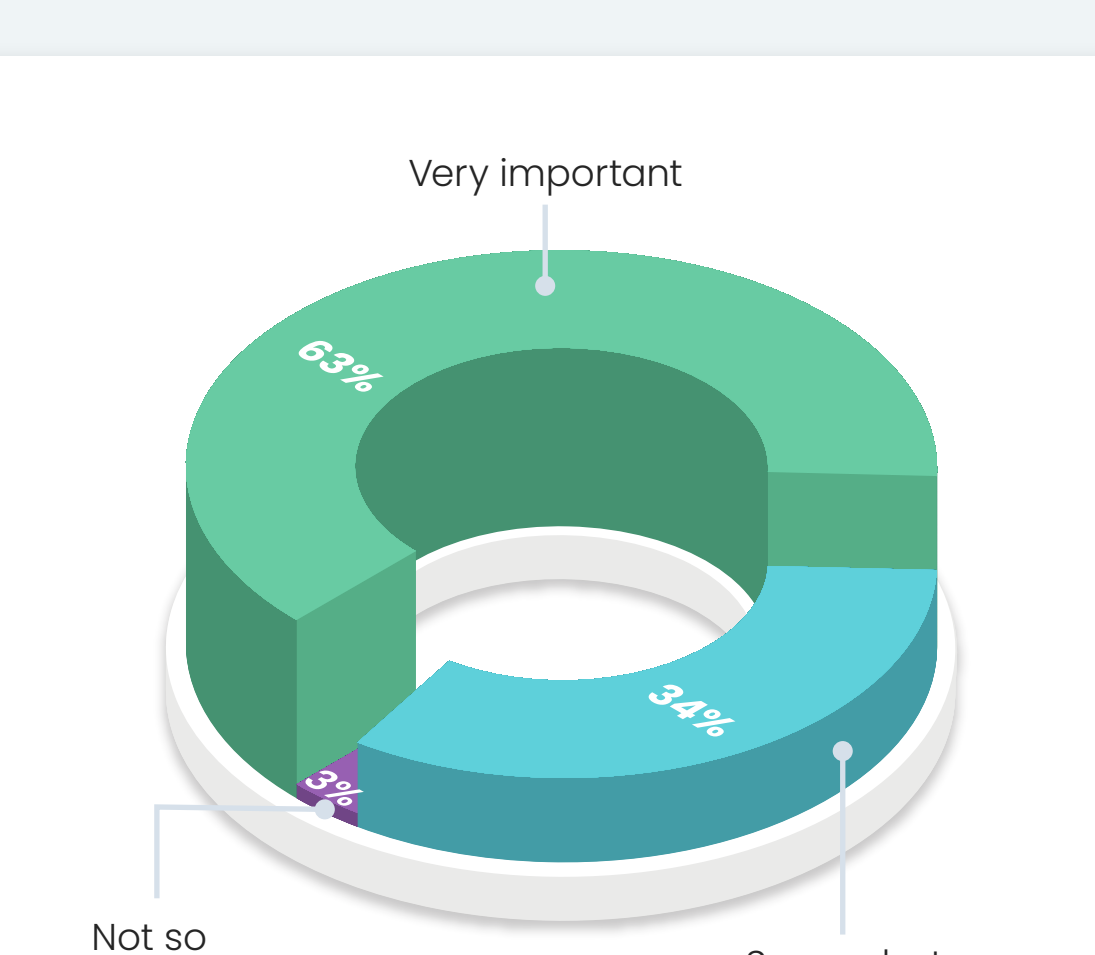


THE HYBRID WORKPLACE

The move to a permanent hybrid work environment impacts planning and mandates on-premises and remote worker flexibility. Over eighty percent expect more than a quarter of employees to remain remote and almost two-thirds require flexibility between on-premises and remote deployments.

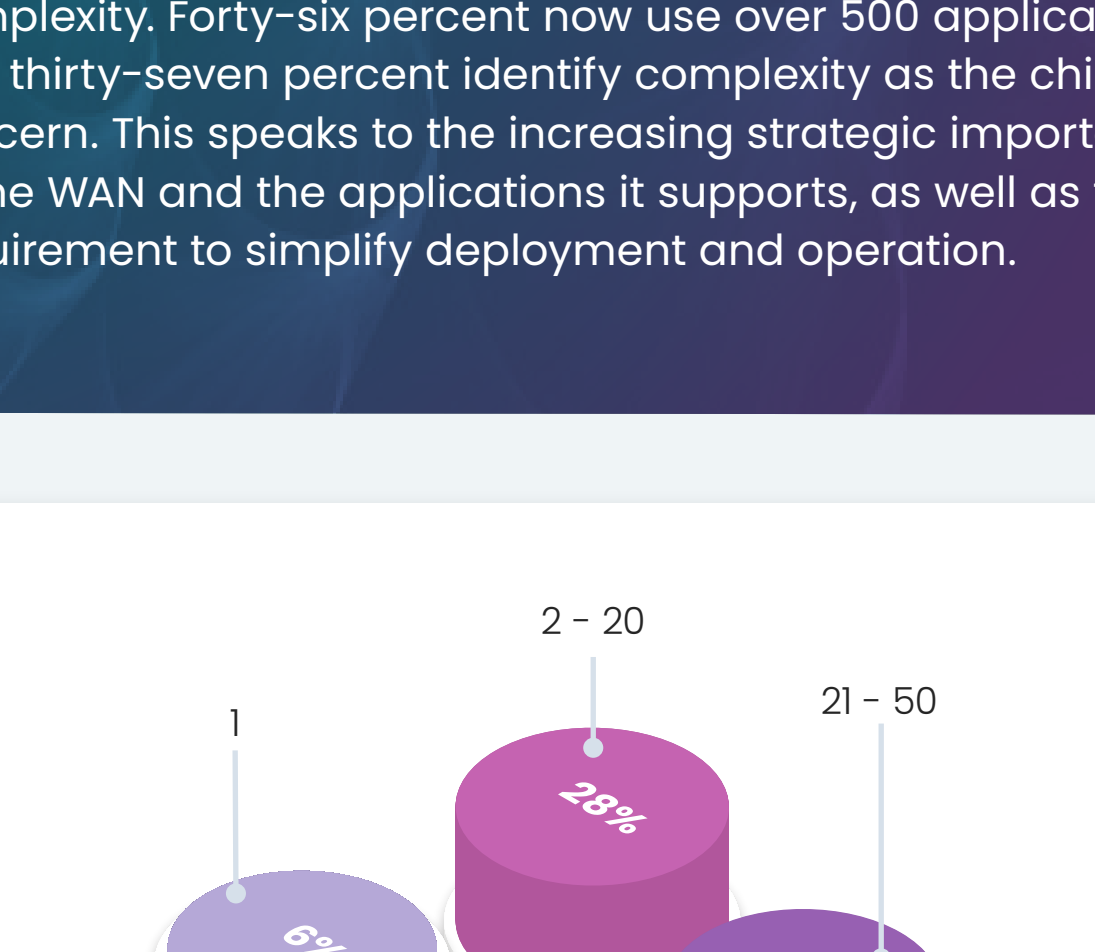
Pandemic Impact on Planning

It goes without saying that 2020 threw us all for a loop. Priorities shifted, influencing overall purchasing plans, including increased support for the hybrid workplace forty-four percent, acceleration of digital transformation projects thirty-three percent, improvement of remote worker enablement thirty-eight percent and increased security for remote users thirty-six percent.



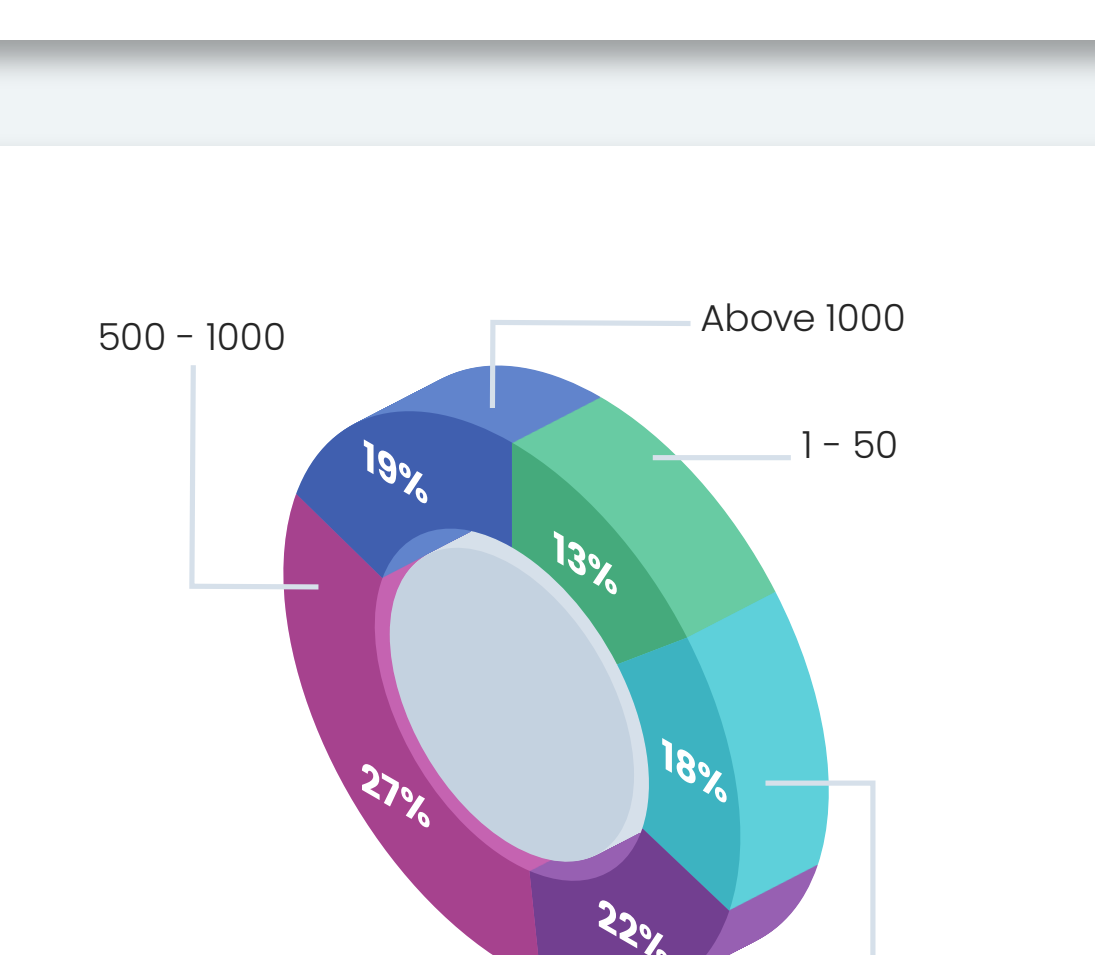
Post-Pandemic Remote Worker Plans

Over half (fifty-eight percent) of surveyed respondents expect twenty-five percent to fifty percent of their users to remain remote by the end of 2021, while twenty percent expect that more than fifty percent of workers will remain remote through the end of the year. This is a massive shift to the remote workplace and will influence investment for years to come.



Requirement For Hybrid Workplace Flexibility

The flexibility mandated by the hybrid workplace is also reflected by sixty-three percent of surveyed respondents stating that the ability to quickly reallocate resources between on-premise and remote is critical, and calls out for a solution that fuses on-premises and remote worker orchestration, policy management, and visibility. Silos won't suffice!

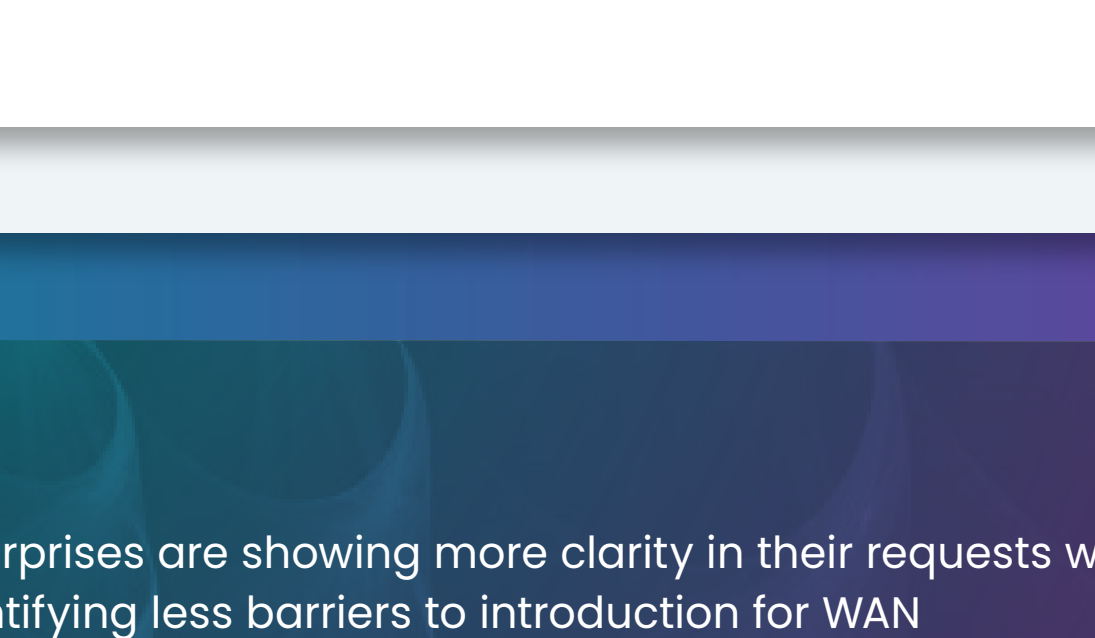


WAN AND APPLICATION GROWTH FUELS COMPLEXITY

Continued WAN and application growth results in growing complexity. Forty-six percent now use over 500 applications and thirty-seven percent identify complexity as the chief concern. This speaks to the increasing strategic importance of the WAN and the applications it supports, as well as the requirement to simplify deployment and operation.

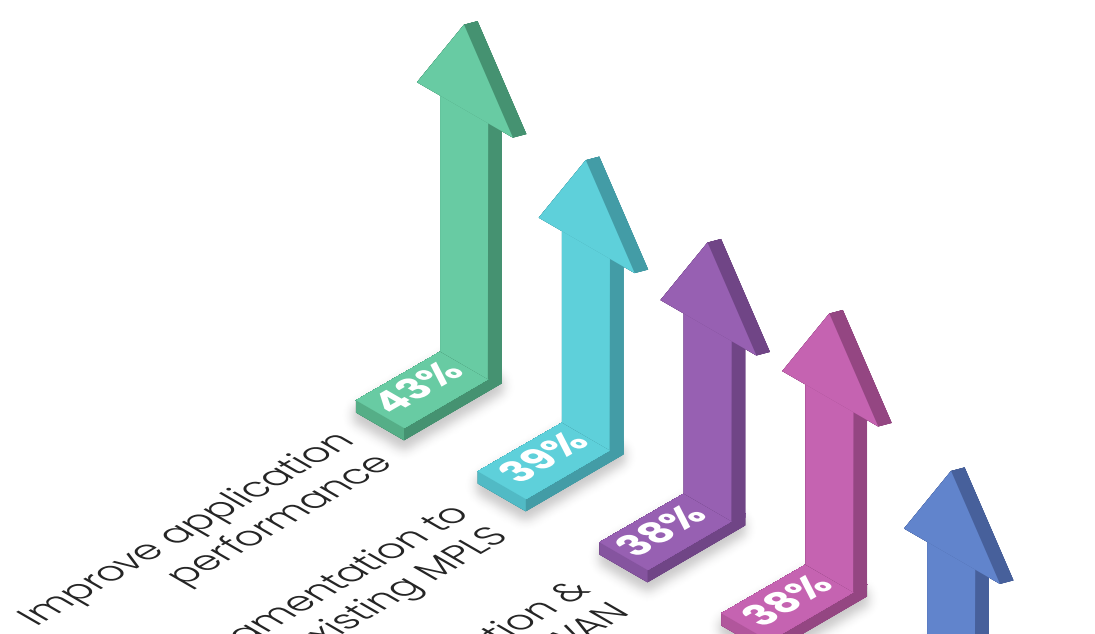
Enterprises Reporting 100 Or More Inter-Regional Sites

Strategic reliance on the WAN continues to increase, with enterprises reporting over 100 inter-regional sites connected growing from nineteen percent in 2020 to twenty-eight percent in 2021.



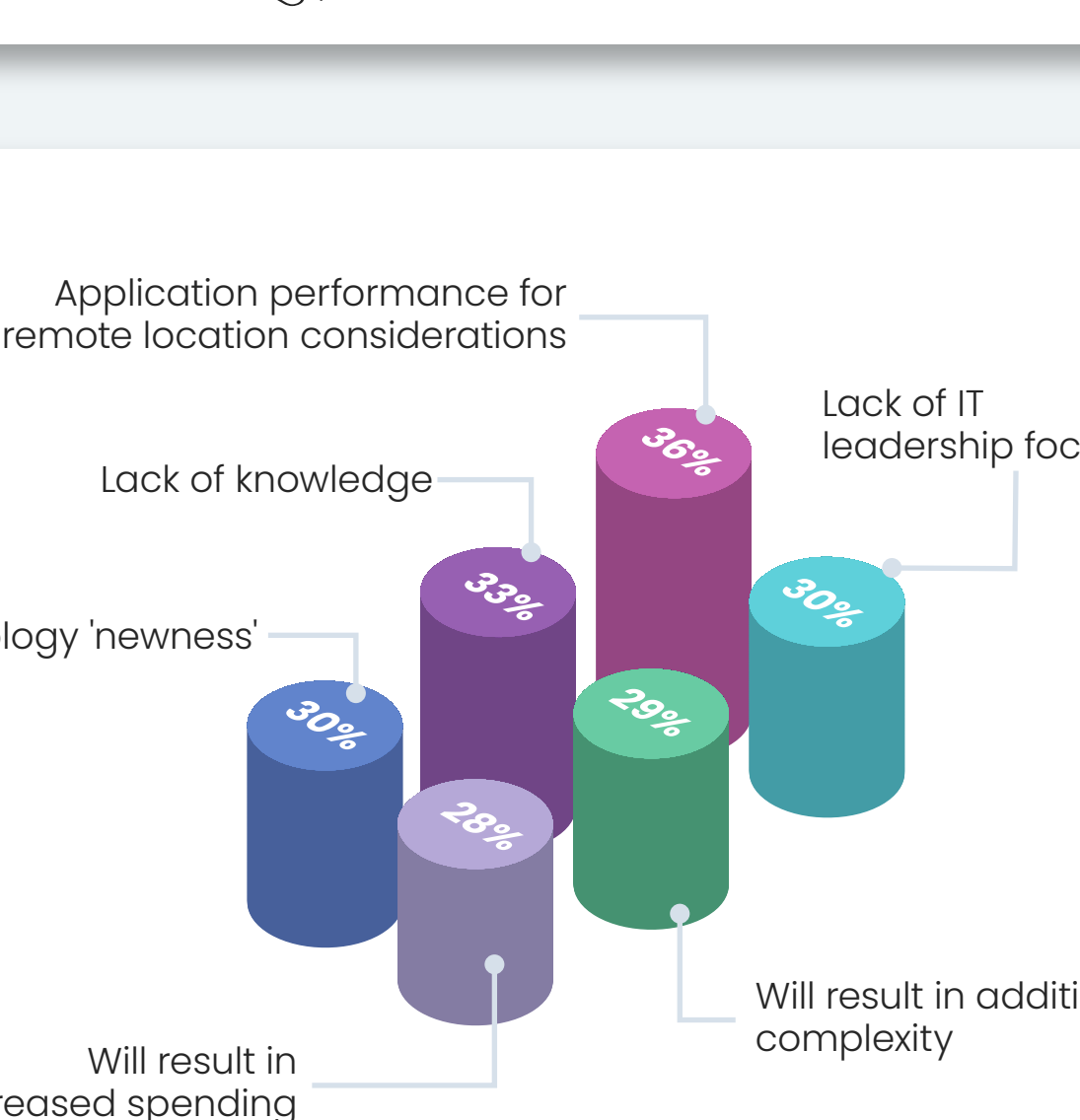
Reporting Over 500 Applications In Use

Likewise, application diversity continues to increase, with those reporting use of over 500 increasing from twenty-three percent in 2019 to thirty-two percent in 2020 and now to forty-seven percent in 2021, a fifty percent gain in a year.



SaaS Application Adoption

In parallel, SaaS adoption continues to gain steam, with those reporting use of over 20 distinct applications growing from fourteen percent in 2019 to twenty-four percent in 2020 and now to thirty-three percent in 2021. UCAAs in particular experienced especially strong uptake due to the pandemic. It is no surprise that Zoom experienced major growth from eleven percent, from twenty-five percent in 2020 to thirty-six percent in 2021, at the expense of other collaboration platforms. Other up-and-coming applications include Microsoft Teams, SAP/HANA, and Slack. There are less issues with what were considered unsanctioned applications, as more become mainstream and officially adopted.



Top WAN Issues

With this growth comes challenges, including increasing complexity, still the #1 issue for IT, as evidenced by thirty-seven percent of respondents and on par with last year, followed by slow application access at thirty-three percent and performance at thirty-two percent. One area that stood out this year was cost, identified by twenty percent in 2021 vs sixteen percent in 2020, a twenty-five percent rise. This may be due to shrinking and/or shifting budgets in response to the pandemic, as well as increasing awareness of the need for cloud cost containment and MPLS contract costs.

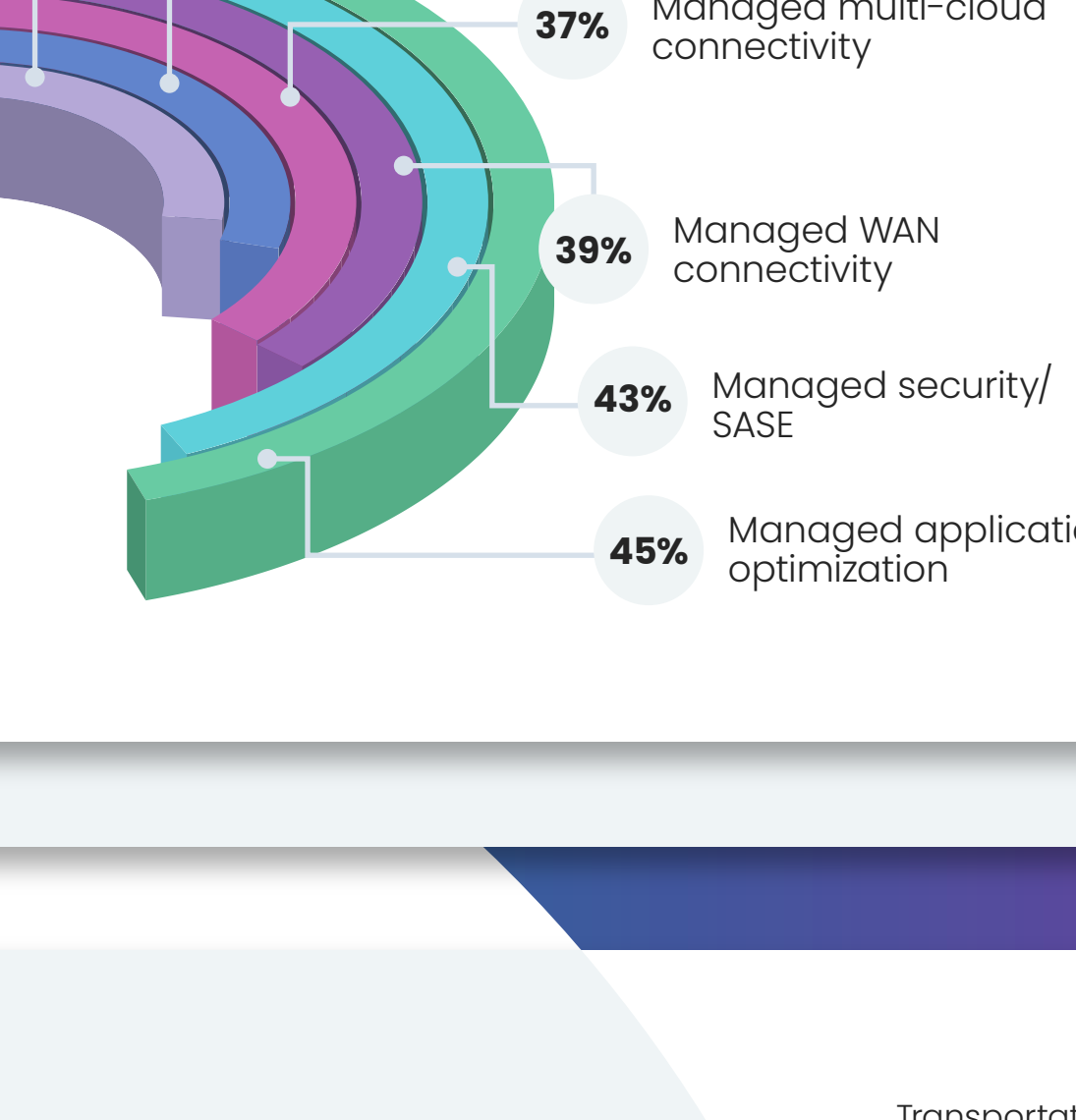


WAN TRANSFORMATION DRIVERS AND BARRIERS

Enterprises are showing more clarity in their requests while identifying less barriers to introduction for WAN transformation. Forty-three percent of respondents now identify application performance as the key driver.

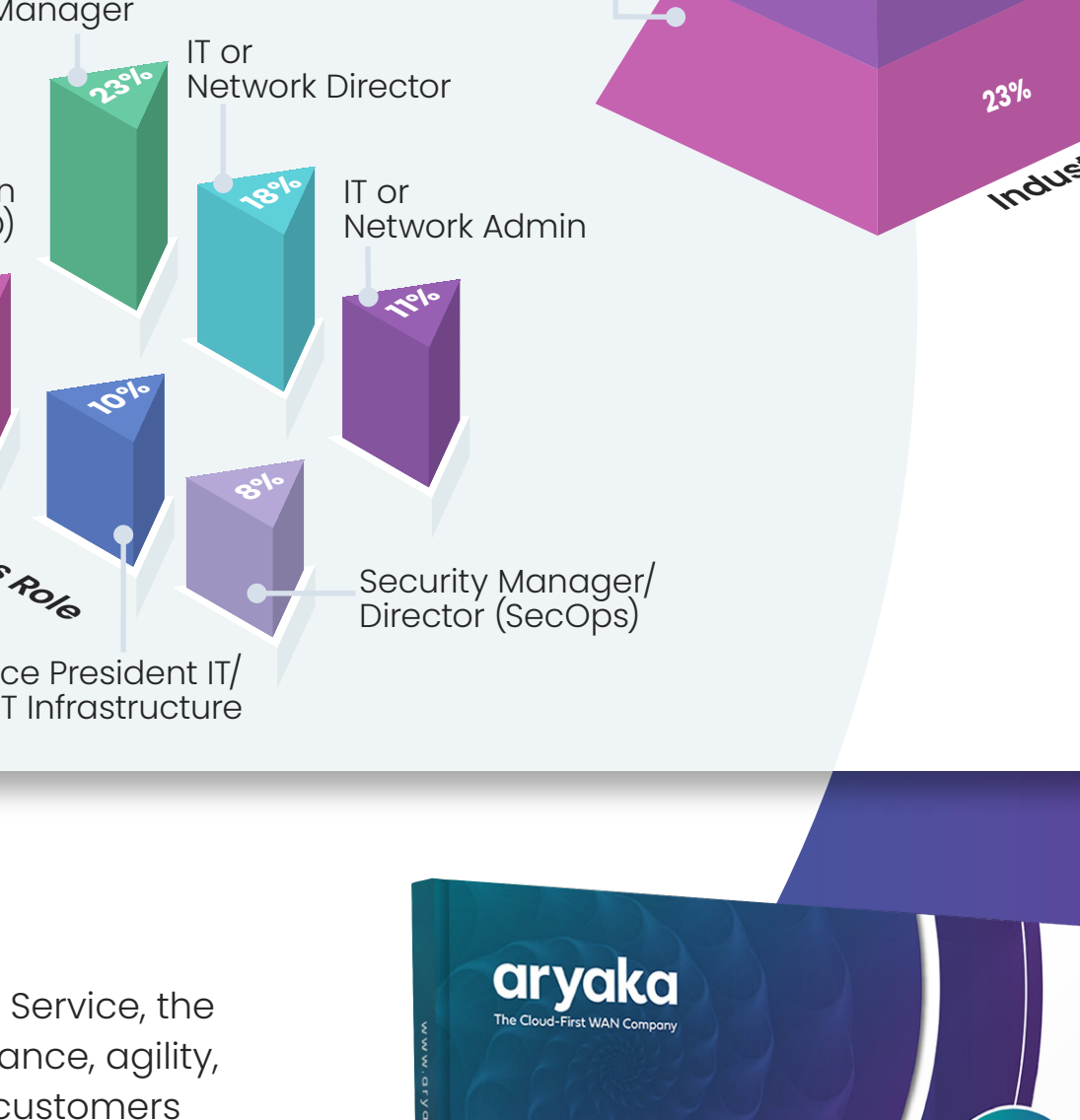
Drivers for WAN Transformation

Why are enterprises looking at a WAN refresh and SD-WAN? Application performance is still #1 at forty-three percent with an increase in cloud consumption or digital transformation initiatives, both at thirty-eight percent. MPLS also plays a major factor, with thirty-nine percent looking to augment their existing MPLS infrastructure with other WAN options and another twenty-seven percent planning for MPLS contract expiration.



Perceived Barriers to WAN Transformation

Identified barriers are dropping, including less angst regarding application performance gains, now at thirty-six percent as compared to forty-three percent in our 2020 report. This also speaks to the need for end-to-end performance SLAs. Lack of knowledge is still the second highest barrier at thirty-three percent, but down from forty percent in 2020 and thirty-one percent in 2019. Technology 'newness' is at thirty percent, down from thirty-four percent in 2020 and thirty percent in 2019. Also at thirty percent is lack of IT leadership focus, but down from thirty-three percent in 2020 and up from sixteen percent in 2019.

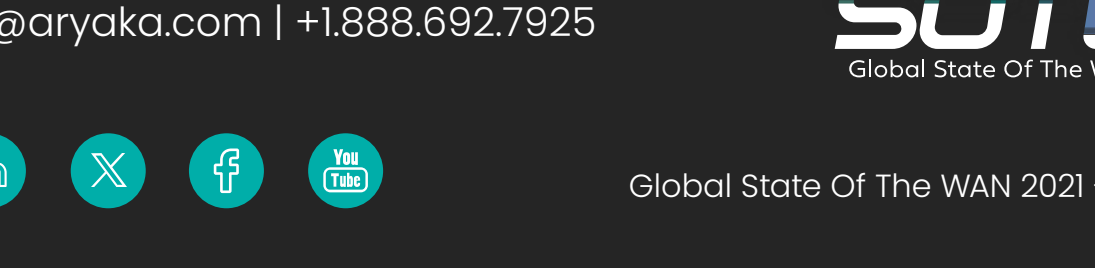


MANAGED SERVICES ACCEPTANCE AND REQUESTS

Enterprise managed services acceptance continues to grow, with seventy percent of surveyed enterprises leveraging or planning to leverage managed WAN services. Top services requests include application optimization, security, and connectivity.

Managed Services Plans

For WAN transformation, over seventy percent are looking to a managed service, while only eighteen percent plan to implement on their own. This also speaks to the importance of an OPEX-driven model, much like the cloud, in a very dynamic environment.



Managed Services Feature Requests

As part of a managed services offer, top asks include application optimization at forty-five percent, security at forty-three percent, WAN connectivity at thirty-nine percent, a multi-cloud fabric at thirty-seven percent, and last mile management at thirty percent, and remote access at twenty-eight percent.

Organizational Demographics

WHY ARYAKA

Aryaka is the leader and first to deliver Unified SASE as a Service, the only SASE solution designed and built to deliver performance, agility, simplicity and security without tradeoffs. Aryaka meets customers where they are on their unique SASE journeys, enabling them to seamlessly modernize, optimize and transform their networking and security environments. Aryaka's flexible delivery options empower enterprises to choose their preferred approach for implementation and management. Hundreds of global enterprises, including several in the Fortune 100, depend on Aryaka for cloud-based software-defined networking and security services. For more on Aryaka, please visit www.aryaka.com.

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